



North Carolina Procurement Transformation

NC E-Procurement Ariba Buyer Upgrade March 2012



Agenda

- **Welcome & Introductions**
- **Ariba Buyer Upgrade**
 - NCID Interface
 - Testing & New Functionality
 - Historical Data Approach
 - Training & Communications
- **Questions & Answers**

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NCID Interface Status Update

Single point of administration and control for simplified management and standardized processes for the State, agencies, end users, and customer applications

- Current entity NCID collection and mapping status
 - 115 communications for LEAs with at **32%** response rate
 - 58 communications for Community Colleges with a **59%** response rate
- Next wave of communications starting in March
 - Will include new Buyer user data since the last reports
 - Will merge the existing responses as part of the new reports
 - Agency readiness will incorporate NCID responses
- Recommended processes associated to NCID user creation and communication
- Functional testing successfully completed as part of System Test Pass 3
 - The NC E-Procurement 9r1 system was integrated with an NCID test instance to verify user updates and authentications work as expected.



System Test Updates

The Ariba Upgrade team has completed execution of 3 passes of system testing.

- Completed 3 passes of System Testing
 - **95% Pass Rate; No Major Issues**
 - Continue working to resolve and retest remaining issues until code freeze takes effect
 - Continue working to test each integration touch point



New Functionality Highlights

Users can now search for values by entering the search criteria directly in the field and clicking “Enter”.

NCE-Procurement
@your service

ARIBA*

SPEND MANAGEMENT

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Welcome Scarlett Swain

Create | Search | Manage | Recent | Preferences

RQ20000636: Untitled Requisition

Items: 0 Total: \$0.00000 USD

OK Cancel

If you cannot locate an item in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process because your purchasing department may get involved to complete the order. Add the ...

Full Description: * Enter a description for this item.

Commodity Code: * 485

Supplier: Search for more...

Location: (no value)

ItemID: (none selected)

WarehouseID: (none selected)

Bid Number: (none selected)

Supplier Part Number:

Recycled Content? ☐ Yes ☒ No

Item Classification: Good

Contract Type: No

Blanket Purchase? ☐ Yes ☒ No

Quantity: 1

Unit of Measure: each

Stock Keeping Unit:

Conversion Factor: 1

SKU Quantity: 1

Price: \$0.00 USD

Tax Rate: Other

Tax Amount: \$0.00 USD

Amount: \$0.00000 USD

Update Total

ACCOUNTING - BY LINE ITEM

Company: (none selected)

Account: (none selected)

Center: (none selected)



New Functionality Highlights

The “Search for more...” option will now produce a pop-up window with related search results. Commodity Code selection has been improved; users will now be able to drill through the commodity hierarchy, as well as searching on keywords in the description.

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ACCOUNTING - BY LINE ITEM

Company: (none selected)

Account: (none selected)

Center: (none selected)

Choose Value for Commodity Code

Field: Name 485 Search

Name ↑	ID	
▶ 145-00 - BRUSHES (SEE CLASS 485 FOR JANITORIAL TYPE)	145-00	Select
435-70 - Skin Cleaners, Antimicrobial: Emollient, Nonalkaline, etc. (See Class 485 for Janitorial Hand and Skin Cleaners)	435-70	Select
435-72 - Soap, Surgical Scrub (See 485-85 for Janitorial Type Scrubbing Soap)	435-72	Select
436-70 - Skin Cleaners, Antimicrobial: Emollient, Nonalkaline, etc. (See Class 485 for Janitorial Hand and Skin Cleaners), Environmentally Certified Products	436-70	Select
436-72 - Soap, Surgical Scrub (See 485-85 for Janitorial Type Scrubbing Soap), Environmentally Certified Products	436-72	Select
▶ 485-00 - JANITORIAL SUPPLIES, GENERAL LINE	485-00	Select
630-45 - Paint and Varnish Removers (Includes Painted Graffiti Removers) (See 485-16 for Other Types of Graffiti Removers)	630-45	Select
631-45 - Paint and Varnish Removers (Includes Painted Graffiti Removers) (See 485-16 for Other Types of Graffiti Removers), Environmentally Certified Products	631-45	Select
810-27 - Fogging Machines for Outdoor Service (See 485-60 for Room Type)	810-27	Select

Done

Total: \$0.00000 USD OK Cancel

Solved to complete the order. Add the ...

Update Total

Local intranet | Protected Mode: On 100%



Historical Data Approach Guidance for a Smooth Transition

The E-Procurement implementation date was moved to align with the fiscal year end in order to reduce the impact on open transactions.

- Additional emphasis should be placed on the fiscal year end process to complete open transactions and ensure a smooth transition to the new E-Procurement system.
- EPLite entities should not stage transactions for the next fiscal year in the old E-Procurement system.
 - Users should not create requisitions in the current E-Procurement system and leave them in ‘Composing’ to be submitted in the next fiscal year. These requisitions will not be available in the new system and would need to be re-entered.
 - Users who submit requisitions from the E-Procurement system with a ‘Need By Date’ in a future fiscal year should wait to enter the requisitions in the new system after go-live. These transactions will not be imported to the E-Procurement system properly and would need to be re-entered.



Communications Activities

Training will be available in several formats to update current users on changes and provide training assets to be used going forward

- Updated **job aids** on the NC E-Procurement web site
- “What’s New” **classroom training** and **webinars**
- Online **training modules** providing a new means of training current and future system users on system functionality
- Watch for detailed schedules and **registration options** coming soon





Training Formats: Job Aids

Job Aids are PDF documents providing screenshots and detailed instructions for specific tasks and topics.

- There are over **450 pages of job aids** currently available in the User Training section of the NC E-Procurement web site
- These job aids are being **updated** to reflect the new functionality
- PDF files provide a **reference library** of materials available to all NC E-Procurement users
- Updated job aids will be posted in mid-April for a first look at what has changed

II. Add Items

Users can add catalog (Statewide Term Contract) items to their eRequisition from the 'Add Items' page using the catalog search functionality. From the 'Add Items' page, a user can also navigate to the eQuote and Punchout options, as well as choose to create a non-catalog item. Punchout, eQuote, and non-catalog requisitioning processes are covered in separate process guides.

Users can search the catalog using several methods, in addition to being able to browse the catalog by clicking a Supplier Name or Category. The user can click 'Options' to view additional search field options.

1. Keywords (e.g., pen) may be entered in the first free-text field next to the 'Search' button.
2. Supplier Part Number: If you know the Supplier Part Number of the Item for which you are searching, enter it here.
3. Manufacturer Part Number: If you know the Manufacturer Part Number of the Item for which you are searching, enter it here.



Training Formats: “What’s New” Sessions

“What’s New” classroom training and webinars provide an opportunity for users to learn in a live environment from the NC E-Procurement team

- “What’s New” sessions offer **focused instruction** on changes to the system and processes
- Sessions are **2-3 hours** in duration and will be held in two formats in the mid-May to mid-June timeframe:
 - Classroom training
 - Webinars

The slide titled "Today's Objectives" features a blue decorative bar on the left side. The title is at the top right. Below it, there are three numbered objectives, each with a colored square containing the number and a corresponding text box:

- 1 • Familiarize yourself with new functionality
- 2 • Understand changes from the old system
- 3 • Be prepared for the new system



Training Formats: “What’s New” Classroom Training

“What’s New” classroom training sessions give entity contacts hands-on access to the upgraded NC E-Procurement and face-to-face contact with the upgrade team

- **Regional training** sessions will be held in six regions across the State:
 - Western NC
 - Triangle
 - Triad
 - Charlotte area
 - Eastern NC
 - Southeastern NC
- **Targeted audience** is Security Administrators or other designated entity contacts
- Trainers will review a **“What’s New” presentation** and give participants an opportunity to try out business scenarios in the **training environment**
- Optional afternoon sessions allow for **informal “office hours”** time to ask questions of the team beyond the structured content in the mornings





Training Formats: “What’s New” Webinars

“What’s New” webinars provide an opportunity for larger numbers of users to learn in a live, virtual environment from the NC E-Procurement team

- **Webinars** will cover the same “What’s New” presentation as the classroom sessions
- **Targeted audience** is any NC E-Procurement user
- Participants will register for a **live session** and receive access instructions
- Presenter will guide progression through presentation with participants viewing screen
- **Question & Answer** time will be provided
- Collaborate! Encourage your entity to attend webinars in small groups to learn together.





Training Formats: Online Training Modules

Online training modules provide a self-paced, on-demand environment in which users can refresh or build their NC E-Procurement knowledge.

- **New online training modules** will provide more detailed training on general system functionality, not just new features:
 - Requisitioning / Approving
 - System Navigation
 - Reporting
 - System Administrator / E-P Lite Administrator
 - Advanced Purchasing
 - Receiving (NCAS)
- Online training will be **available to users** on the NC E-Procurement web site to access individually on their schedule beginning in late May
- Training will include **demonstrations** with audio commentary and opportunities for participants to test their knowledge
- Online modules will be a valuable asset going forward for **onboarding new employees**



Questions?